

Marketing Team WORKSHOP

INSTRUCTOR'S GUIDE

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Marketing Team WORKSHOP

LESSON PLAN (About Two Hours)

PURPOSE: The purpose of this session is to provide information on the marketing plan of the Learning for Life Committee and the steps leading to the organization of an Explorer post or Learning for Life group. The session includes: Student Career Interest Surveys, Impact Plans, Selecting Participating Organizations, "Selling" Learning for Life programs, Steps To Organize an Explorer Post or Learning for Life Group, and the Council or District Exploring Marketing Guide.

MATERIALS FOR COURSE:

Flip chart with marking pens
Explorer Leader Handbook, No. 34637A
Learning for Life Executive Guidebook, No. 99-064

MATERIALS FOR PARTICIPANTS:

Explorer Post New-advisor Kit, No. 99-209
Character Education in Exploring flier
Exploring Program Development Guide
Exploring Sales Kit, No. 99-271
Learning for Life, Overview, No. 99-150
Marketing Team Guide, Reproduce pages 14-18
Sample Student Career Interest Surveys, No. 99-205

START OF SESSION –

STUDENT CAREER INTEREST SURVEY

DETERMINING THE MARKET

If you line up 100 teenagers, you would find a variety of interests. Maybe 10 in medicine, 6 in communications, 12 in aviation, 14 in engineering, and so forth. So Learning for Life found that if we are to reach this age group, it has to be through a variety of School-to-Careers programs, which we call career specialties. Explorer posts or groups specialize in career programs. Young adults join these posts or groups because of their interest in the specialty program being offered. The post or group is organized with a community organization, which has adults who can provide this specialty program.

Such as the hospital organizes a post specializing in medicine and health careers, the airport organizes an aviation post, the sheriff has a law enforcement post, and IBM organizes a computer post.

It doesn't matter what the specialty is, so long as it is compatible with Learning for Life purposes and enough young adults are interested in the specialty to join. The excitement and challenge of Learning for Life is this flexibility to organize posts or groups which meet the needs of youth and may provide a worthwhile service to the community.

NEEDS ASSESSMENT

Success in organizing Learning for Life school curriculum programs starts by utilizing the Learning for Life school needs assessment for K through 12th grade school administrators.

STUDENT SURVEY

Success in organizing Explorer posts and High School groups starts with our ability to identify our youth "market". That is, we have to determine the career interests of high school age young adults and be able to invite them to join posts or groups relating to these interests. The best method that Learning for Life has found so far to achieve this is by conducting an annual survey of all high school students within the community.

SURVEY PURPOSE

The purpose of the survey is to provide a listing, by career interest, student names, addresses, community, phone, grade, age, and school. This information is used to invite students to join Explorer posts or groups in their career area.

The survey provides a "market analysis" to determine what kinds of posts or groups to organize. For example, if 200 students list law as a career choice then the marketing team knows to look for an organization - law firm, etc. that could organize a good post specializing in law.

It also provides a service to our schools by giving them, at no cost, a complete listing of their students' career choices. This demonstrates our desire to support the school's efforts toward effective career education.

THE SURVEY FORM

Most survey forms and computer programs are developed within the local Learning for Life office. Attempts are made to get donated computer time. This allows you to localize the survey. A special interest code listing is available from the national Learning for Life office. The same coding is used to identify the posts' specialty. A Mark Sense Survey form is available from National Computer Systems. Information on this is sent to local Learning for Life offices each fall.

SELLING SCHOOLS ON CONDUCTING THE SURVEY AND NEEDS ASSESSMENT

Learning for Life must build and continue to maintain a strong relationship with school officials.

Learning for Life programs can be endangered if the school refuses to survey or make a needs assessment. We have to continually promote the purpose of the survey, our service to the school, and the abilities of Middle, Senior High School, and Exploring programs to strengthen the school's career education efforts.

This can be done by:

1. An annual hosted dinner or luncheon where members of your Learning for Life committee and the leaders of organizations having posts or groups demonstrate to school officials their enthusiasm for the Learning for Life programs and our ability to help the schools.
2. Keep good lines of communication with school administrators. The marketing team for Learning for Life staff should plan regular visits to high school principals and counselors.
3. You are only asking for about ten minutes of a student's time each year. For this, schools will have the information, which can help their counselors support their school's curriculum and career education plans.

**WHAT IF THE
SCHOOL HAS
OWN CAREER
INTEREST
SURVEY?**

1. See if you can review their material. It may be that ours is better. We have gained a lot of experience as a national organization in conducting this survey all over the nation.
2. Perhaps a Learning for Life representative can conduct the survey for the school to save their staff time. Perhaps our survey could replace theirs.
3. Can you get names from their survey for use by participating organizations that want to organize special-interest posts or groups? Again, you are no longer in control but this is better than no names at all.
4. Convince the school to conduct our survey on the merit of involving their students in Learning for Life programs.

**WHAT ABOUT
THE FAMILY
EDUCATIONAL
RIGHTS AND
PRIVACY ACT
OF 1974**

Some schools may decline to survey because they feel it violates the Student Privacy Act (Senate Joint Resolution 40, Section 48) commonly called the "Buckley" Amendment. Learning for Life has reviewed the Family Educational Rights and Privacy Act of 1974 with the U. S. Department of Education to insure that the Career Interest Survey is not in violation of the act. Some states have laws protecting the rights and privacy of students.

In general, the intent of these laws is not violated by our career interest survey. However, local interpretations may vary. Usually, the school, which does not want to survey, may use these laws as an excuse. Learning for Life office should contact their area director for specific help.

**ALTERNATIVES
TO SURVEY
NAMES**

In the case you don't have career interest survey names, other alternatives are possible.

1. A simple interest survey form could be designed for use in schools.
2. High school counselors might have some idea of student interests and might even be willing to help recruit.
3. Assemblies, after school, or lunchtime meetings held in schools. (All students interested in a career in medicine are invited to a brief meeting today in room 112 at 3:00 p.m.)
4. Attractive posters can be posted on school and participating organization bulletin boards.
5. Announcements could be made on radio and in newspapers.
6. Flyers distributed to students indicating upcoming meeting.

SELECTING THE RIGHT PARTICIPATING ORGANIZATION

HOW TO FIND ORGANIZATIONS Now that we have a career interest survey and know the top 20 career interests of youth in our communities (the "market") how do we go about finding organizations to organize posts or groups in these interests?

Encourage discussion - look for the following points:

1. Chamber of Commerce listings
2. Information from public libraries
3. Ask district/council volunteers
4. Professional organizations

WHAT DO WE LOOK FOR? What do we look for in chartered organizations?

1. The goals of the organization are compatible with those of Learning for Life.
2. The organization is civic minded and interested in youth.
3. We estimate that the organization has ample employees or members to provide leadership.
4. The organization has sufficient program resources to support the post's or group's career interest area.
5. We somehow determine that it is the "best" available community organization to organize posts or groups.

THE IMPACT PLAN

The instructor should review Learning for Life Impact Plan, Learning for Life Executive Guidebook to prepare for this presentation.

The Impact Plan is designed to identify and sell businesses, industries, professions, institutions, and community groups on the Learning for Life program.

INTRODUCTION It is a step-by-step approach to ensure the understanding and commitment of these groups to begin the organization of Explorer posts or groups.

The success of the Impact Plan is dependent upon an influential community leader inviting the top person of each prospective organization to attend a meeting (breakfast, luncheon, etc.) which is designed to "sell" them on the Learning for Life program.

IMPACT PLAN STEPS

1. Based on determining the top 20 career interests from the student interest surveys a list is made up of those organizations having the program resources matching student interests.
2. From this list, the marketing team and Learning for Life staff select those organizations, which have the potential to organize a successful Explorer post or Learning for Life group.
3. A community leader is recruited as "impact chair" who has the influence to get the top person of each of these prospective organizations to attend an impact breakfast or luncheon.
4. The impact chair invites these top persons to the impact meeting where the purpose and program of Learning for Life is featured.
5. A commitment is secured from the top person to have Explorer posts or groups in his or her organization. A service team volunteer or organizer begins the process of organizing a post or group using the Exploring Sales Kit.

RECRUITING THE IMPACT CHAIR

The chair of the Impact Plan is the key to its drawing power and ultimate success. The Learning for Life committee chair should assist the marketing team chair and Learning for Life staff in recruiting a top-level community leader with the necessary prestige and "clout". This is essential to success.

**WHERE IS THE
IMPACT
MEETING HELD**

The impact meeting is usually a breakfast or luncheon in the private room of a prestigious club or restaurant. However, many are simply a meeting. In any event, the location should be as impressive as possible to those attending and every effort should be made to ensure a quality program. Conduct several impact meetings for only 10 to 20 people. This allows several choices of dates and a more personal contact with attendees.

**WHEN IS THE
IMPACT
MEETING HELD?**

The focal point of organizing an Explorer post or Learning for Life group is the "first meeting," when young adults are invited to join a post or group. The best time to invite young adults is in August or September when they are back in school and ready to join organizations. The ideal time then, to start the steps of organization of a post or group is in May to allow ample scheduling for adult leader recruiting, training, and program planning leading up to the first meeting, in August or September.

**WHAT IS THE
COMMITMENT
THAT WE WANT
FROM THE CEO**

Success in organizing a post or group is dependent upon the involvement and enthusiasm of the head of the organization, whether it be the owner of a business or the CEO of a large corporation. Their decision making power and ability to influence others in their organization is necessary to the first few steps of organizing a post or group.

The impact chair should invite only the head of the organization with the understanding that this is a personal invitation. Discourage, if possible, the prospective organization sending someone else. Lower echelon persons cannot speak for the organization or make the decisions and commitments.

SELLING LEARNING FOR LIFE PROGRAMS

SELLING LEARNING FOR LIFE

Lets review some key points related to "selling" the head of an organization on starting an Explorer post or Learning for Life group either after he or she attends an impact breakfast or if an individual contact is being made.

The instructor should review the "Exploring Sales Kit

LIST THE KEY POINTS ON FLIP CHART

1. Determine the need.
2. List potential participating organizations.
3. Do some homework.
4. Select the right post or group organizer.
5. Develop a written proposal.
6. Select the right door opener.
7. Prepare a kit.
8. Work out a "Sales Pitch".
9. Get the appointment.
10. Making the sale.
11. Follow up carefully.

Ask for questions, suggestions and discussions. Role playing demonstrations or discussion groups could expand this session.

SUCCESSFUL STEPS TO ORGANIZE A POST OR GROUP

Use a flip chart to highlight the steps. The instructor should review the "Exploring Sales Kit."

INTRODUCTION The five steps to organize an Explorer post or group is based on the successes in organizing posts across America. While it is not the only way to organize a post or group, we recommend these steps as the best way.

Remember that we have to get the commitment of the organization for Program Resources as well as leadership and a meeting place. The "boss" and the key leadership must understand and support their Explorer post or group or difficulties may arise.

STEP ONE ORGANIZER SELLS CEO

Our first step is to recruit a volunteer who will guide the participating organization of the post or group from start to finish. Granted, many posts and groups are organized by staff, but it is our job to recruit and train volunteers.

It is recommend that the organizer be the service team volunteer who will be assigned to the post or group after it is organized.

The head of the participating organization is sold on the Learning for Life program at the impact meeting or by a personal approach by the organizer and a key volunteer. It is important at this point to deal only with the top person in the organization.

We ask the top person to agree to three key points, which are vital to the success of a post or group.

1. Be personally committed to the organization's having a successful post or group.
2. Call a meeting of the key leadership of the organization and sell them on the Learning for Life program.
3. Help identify and recruit the post or group adult volunteer leadership.

Try not to take any shortcuts. Try to get the top person to commit to these three points, this almost ensures a successful post or group.

STEP TWO BRIEFING MEETING OF KEY STAFF

The top person calls together, or confers at a regular meeting of the key leadership of the organization, such as:

- department heads
- Rotary Club board
- vice presidents
- executive committee, etc.

We try to achieve the following with this group.

1. Understand Learning for Life programs and have the top person express his or her enthusiasm for a successful post or group.
2. Provide ideas, projects, tours, facilities, etc., for the post or group by completing the Program Capability Inventory (PCI) or .School Needs Assessment.
3. Identify the post or group organizing committee.

At this point, you may have several alternatives:

1. This group is the "Organizing Committee." They organize the post or group, plan programs, and recruit adult leaders. The organizing committee becomes the post or group committee.
2. There may be a logical person as post Advisor. The committee recruits him or her.
3. Another method is to simply start the group on training and planning the post or group program. As they begin to see what the post or group will be doing, they usually become very enthusiastic and recruiting an Advisor is easier.

In any event, use the influence of the top person to start the post or group organization process.

The new Advisor and committee attend the Explorer leader basic training. Ideally, this is done during the second training session, when the post or group program is actually planned. Other wise, new leaders can attend these sessions on a group-training basis.

STEP THREE CONDUCT PCI AND PLAN PROGRAM

The post or group program capability inventory (PCI) is the start of the gathering of resources for the post or group program. The post Advisor, committee, and other adults in the participating organization complete the form indicating that they are willing to share their career, skills, and contacts with the post or group.

Included in the PCI are the program resources provided by the key leadership meeting in Step Three. These PCI forms are tabulated into a list of program ideas for the post or group. Now everyone knows exactly what the organization is willing to share with its youth participants.

From the PCI, the first three months suggested meetings and activities for the new post or group are selected. The most exciting "hands on" kinds of activities should be selected. Once officers are elected, they will be trained by the Advisor to begin the planning of subsequent meetings using the organization's PCI.

A typical month's program would be two post or group meetings and perhaps a Saturday activity. The post or group committee meets monthly to support the program and the elected officers and Advisor meet monthly to plan the program.

Identify the basic literature that each post Advisor or classroom teacher should have: Display the Explorer Leader Handbook, Learning for Life Curriculum Books and CD ROMs, and Explorer Post New-Avisor Kit.

STEP FOUR DISTRIBUTE INVITATIONS

Now the post or group is ready to invite young adults to join. By one of the methods we described earlier (career interest survey, school assembly, etc.), we invite prospective youth participants to a "First meeting" which is a kind of open house conducted by the participating organization to inform young adults about the new post or group and encourage them to join.

STEP FIVE CONDUCT FIRST MEETING

Either at the first meeting or the next post or group meeting, the adult and youth rosters and participation fees are collected. See "First meeting" agenda in Explorer Leader Handbook.

**FOLLOW-UP
POST
OFFICERS'
BRIEFING**

The Advisor plans the date, time, and place of his or her officers' briefing, which should be conducted by the new post or group as soon as possible after the election of officers (See adult leader section, "Explorer Leader Handbook").

Depending on the makeup and interest of new Explorers, you can:

- Hold a regular election.
- Elect temporary officers.
- Appoint temporary officers until the youth participants know each other well enough to hold an election.

**FOLLOW-UP
POST OFFICERS'
SEMINAR**

The Advisor trains within the first three months new officers and begins to develop them as a leadership team. During the seminar, the next nine month's post program is planned (See Post Officers' Seminar in the "Explorer Leader Handbook").

CONCLUSION

Now you have given birth to a new post or group. But it is a very fragile thing and requires continual coaching and help. Your service team volunteer should carefully support, coach, and counsel the new Advisor or Guidance Counselor.

We have to be sure that:

- The post or group program meets the need and interests of its youth participants.
- The newly elected officers are trained and coached to become leaders.
- The post or group committee supports the Advisor/Guidance Counselor and program.
- The participating organization is involved with and responsible for its post or group.

Questions and discussion on post or group organization.

MARKETING TEAM GUIDE

(Reproduce for each participant pages 14-18)

MARKETING MINDED

Marketing is one of a council or district's most exciting and important function. Marketing can have a dramatic impact on participation growth, contributions, United Way relationships, new-program growth, volunteer recruitment, and more.

Effective use of marketing techniques can make promoting Learning for Life programs easier and more productive. Marketing can be used as a means to growth.

PURPOSE

This presentation highlights techniques for marketing Learning for Life programs. It should encourage volunteer marketing teams to:

- Get excited about marketing our fastest-growing program.
- Build a Learning for Life marketing plan.
- Provide suggestions for marketing Learning for Life programs.

BUILDING A PLAN FOR MARKETING

Most of us wouldn't think of taking a long trip without proper planning. Every trip plan should have some basic parts, as should every marketing plan. First, we need to know where we are now; second, where we are going; and third, how we are going to get there. Develop your Learning for Life marketing plan the same way.

STEP ONE: ANALYSIS

Some research might be done ahead of your first meeting to answer some of these questions, but a group discussion is a good way to understand where you are prior to setting your goals and identifying your challenges. Answer these questions:

- What are our LFL program's strengths and weaknesses?
- What kinds of programs do we have?
 - How much does our community know about Learning for Life programs?
- What is our relationship to local school districts?
- Do school authorities really know about LFL and its benefits to them and to youth?
- How much do teenagers know about Exploring or High School LFL programs?
- How much do the local council board members and other volunteers know about LFL programs?
- What marketing resources do we presently use (i.e., newspapers, radio,

TV, trade journals, etc.)?

STEP TWO: IDENTIFY YOUR GOALS

Next, identify your goals and objectives in a way that you will know when you get there. In marketing, two types of goals exist:

- **Image Goals.** Want to be perceived a certain way.
Or
Want to change the way others perceive you.

For Example: We want to be seen as the leading character education program for teenagers.
We want to change our image to show Learning for Life program's positive impact on the lives of teenagers.

- **Action Goals.** These are measurable goals

For example: We want to have a strong working relationship with eight local high schools.
We want to conduct fifteen school district presentations.

Goals should be ambitious, but achievable. You may set image goals, action goals, or both. Because situations constantly change, goals may have to be revised from time to time.

STEP THREE: PLAN OF ACTION

This is the step where most of the work is done. A plan of action can be chronological, functional, or a combination of both.

- **Chronological.** Follows a calendar schedule for things to do in all steps of planning
- **Functional.** Includes categories such as internal, schools, businesses, service clubs, parents, and students.

Here are some functional examples:

(Ask for questions, suggestions and discussions. Role playing demonstrations or discussion groups could expand this session)

SUGGESTED EXAMPLES FOR A FUNCTIONAL PLAN OF ACTION

Internal.

Write articles about Learning for Life for the council newsletter.
Develop a Learning for Life newsletter.
Report on Learning at council and district meetings.
Have Explorers present reports.
Display Learning for Life program pictures at the council service center and at participating organizations.
Provide adequate Learning for Life resources at the trading post.
Have Explorers involved at openings and closings for district, council, and public functions.
Use the Learning for Life awards and recognition plan for youth leaders.
Have posts conduct programs for Learning for Life classes or other youth groups. Example: An engineering post could do a Learning for Life Senior High Workshop for a math class.
Maintain a bulletin board with pictures of Learning for Life activities.
Train and encourage posts and groups to have their own public relations plan.
Feature Learning for Life at executive board meetings.
Design your own brochures, posters, and leaflets.

Schools.

Present a program on Learning for Life benefits for school district personnel, principals, guidance counselors, etc.
Meet with guidance counselors to brief them on Learning for Life programs.
Show a Learning for Life promotional video at schools.
Leave informational brochures with counselors.
Send counselors a copy of the Explorer post first meeting invitations.
Share successes with school personnel.
Adequately thank school personnel.
Invite school personnel to Learning for Life activities.
Consider schools for awards such as the Russell C. Hill Award.
Put school personnel on the mailing list for your Learning for Life newsletter.
Design and use a Learning for Life information (marketing) kit for school personnel.
Host a recognition and information breakfast, luncheon, or reception for school district leaders and principals.

Business.

Present a Learning for Life program at chief executive officer roundtables, etc.
Consider business organizations for awards such as the William H. Spurgeon, III Award.
Schedule regular, individual visits with corporation heads and managers to discuss Learning for Life.

Invite corporation heads to Learning for activities, i.e., recognition activities and events.
Have Explorers speak at or provide some service to meetings of corporate heads.
In a very visible way, recognize businesses that support Learning for Life.
Place Exploring articles in trade magazines and in-house newsletters.
Place Exploring ads or articles on Learning for Life programs in newsletters and magazines of chambers of commerce.
Design and use a Learning for Life information (marketing) kit for businesses.
Leave Learning for Life brochures in office waiting areas.
Display Exploring posters in public business areas like storefronts and malls.
Have Explorers present demonstrations in business areas like malls.
Request the use of unused billboards around town.

Service Clubs.

Have volunteers, Explorers, and staff members present programs about Learning for Life.
Make a list of clubs and visit them regularly.
Have Explorer posts support service club projects.
Have Learning for Life participants apply for service club scholarships.
Have Explorers speak to clubs about big accomplishments such as receiving an Exploring scholarship or attending a national post career related conference.
Invite service clubs to support district or council Learning for Life activities.
Place Learning for Life articles in service club newsletters.
Have service clubs provide Exploring scholarships or sponsor an Explorer posts.
Design and use a Learning for Life information (marketing) kit for service clubs.

Parents.

Send a Learning for Life newsletter to parents explaining what the Learning for Life program is about and its benefits to their son or daughter.
Using program highlights from the annual post meeting schedule, prepare the post and assist members with planning a special parent's night meeting.
Invite parents to Learning for Life activities.
Target public relations at parents.
Invite parents to a Learning for Life program meeting to discuss their role.
Design a brochure or information kit for parents.

Students.

Display Learning for Life posters at schools.
Distribute announcements about post successes and Exploring activities.
Have Learning for Life program displays and demonstrations in school hallways and lunch areas.
Distribute informational brochures designed for students.
Participate in school assemblies. Be sure the program tells what Learning for Life is and what local posts and groups do.
Target public relations at students.

Publish articles regularly about Exploring and post activities in school newspapers.
Conduct Learning for Life recognition in visible ways such as presenting the Career Achievement Award, Congressional Award, Leadership Award, or Young American Award during a school assembly or at the halftime of a high school sports game.
Place articles in newspapers and newsletters about Learning for Life student participant's recognition and accomplishments.
Display Learning for Life posters or exhibit where students hang out.
Publish results of the student career interest survey.
Use peer spokesperson.

KEY TO SUCCESS

Your marketing plan can produce amazing results if well executed. Remember that you marketing efforts must be consistent and sustained. A month long marketing campaign will probably have a positive impact, but not one of the magnitude of a coordinated, consistent three-year effort. Once results can be seen, you will start looking for the marketing potential in everything that you do. Marketing can have a powerful influence on your district or council's success. Make marketing part of your style.

END OF SESSION